



USDA Foreign Agricultural Service

# GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

**Date:** 3/15/2006

**GAIN Report Number:** CO6003

## Colombia

## HRI Food Service Sector

## Annual

## 2006

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**Report Highlights:**

Sales of food and beverages by the hotel and restaurant sector in Colombia were estimated at \$1.8 billion in 2005, an increase of 6% over 2004 sales. The estimated growth of the sector in 2006 is 6 to 7%. The hotel and restaurant sector is experiencing rapid growth as improvements in the security situation encourage greater tourism and eating out in restaurants. The U.S. and Colombia negotiated a bilateral free trade agreement with the goal of implementing the agreement in 2007.

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Includes PSD Changes: No  
Includes Trade Matrix: No  
Unscheduled Report  
Bogota [CO1]  
[CO]

## Section I

### Market Summary

The U.S. and Colombia concluded negotiations for a bilateral free trade agreement on February 27, 2006. The goal is to implement the agreement in 2007 after approval by the US Congress and Colombian legislature. Colombia currently has relatively high duties for processed food products imported for the Hotel, Restaurant and Institutional (HRI) sector (generally around 20 percent). These will be eliminated or phased out under the agreement (information on the agreement can be found at the web page of USTR – [www.ustr.gov](http://www.ustr.gov)). The rising value of the Colombian peso relative to the U.S. dollar and strong competition in the restaurant sector have already made U.S. food products more attractive to local purchasers, despite the current high duties and strict registration requirements that cost around \$1000 per product registered.

HRI sector sales of food and beverages in Colombia were estimated at \$1.8 billion in 2005, an increase of 6% over 2004 sales. Growth in 2006 is estimated at between 6 and 7 percent. The market has benefited from the arrival of world-class hypermarkets oriented towards the food service sector, such as Makro and Carrefour, stores that are already operating in the country. Falabella from Chile, with space of 10,000 square meters, will open the first store in Bogota in May, 2007. Foreign investment by international chains in Colombia is due to the continued economic recovery and the improvement of the security situation over the last four years. Local Colombian hypermarkets, such as Alkosto, Carulla-Vivero and Almacenes Exito are developing strategies to serve the food service sector as well. Colombia is experiencing an increase in hypermarket chains and a decrease in the number of HRI sector importer/distributors. Foreign processed food brokers, who are the major suppliers of the Colombian HRI sector, are facing strong competition from domestic producers. Distribution channels for hotels and restaurants have become more efficient, while the system for sales to institutions is still relatively small and underdeveloped. Public institutions use very few imported products.

Changes in consumer taste and consumption patterns and the rise in female participation in the labor force have demanded new market strategies. The remarkably young population, 70 percent of which lives in urban areas, has new tastes and preferences and is more health-conscious and selective. With rising participation of women in the workforce and greater use of fast food restaurants, demand for new high-value products is increasing. Current consumer trends indicate that buying decisions are increasingly based on quality and price. There is a general perception that U.S. products are of good quality and value.

The hotel and restaurant sector catering to tourism has potential for growth driven by the tourism sector, though it continues to be affected by persistent internal conflict. The government campaign “live Colombia and travel in it” has fostered in-country tourism through out the country, with a significant portion of the tourists traveling to Cartagena and Santa Marta on the northern coast. Foreign tourism is still relatively small and generally concentrated in the historic colonial walled city of Cartagena, while international business travel is generally to Bogotá, Medellin, Cali, Cartagena and Barranquilla. Eco-tourism in Colombia is growing rapidly with government support. Travel agencies are offering especial tourist packages to local and foreign tourists. The main areas of the country for eco-tourism are the coffee region, the Amazon, Boyaca State, etc.

Quick service and fast food restaurants, especially franchises, are expanding rapidly. Colombians are getting more inclined to eat in fast food restaurants due to work schedules, prices, and convenience. Most of the fast food restaurants are American franchises, although there are several local fast food restaurants that use American techniques and marketing strategies. Currently, away-from-home meals represent nearly 24 percent of food spending. High and upper-middle income groups are interested in foreign cuisine and are eating out more frequently, at least twice a month, devoting 24 percent of food spending to meals outside the home.

Most hotels and restaurants in Colombia buy food products from food importers and retailers specialized in the food service industry. Fruits and vegetables are mostly bought at wholesalers. Dairy products are

bought directly from Colombian dairy plants and distributors. There are some ethnic restaurants with specialized menus like Italian, French, Mexican, Cajun, Japanese, Chinese, etc. Those restaurants buy the essential ingredients for their menus from specialized importers. The restaurants that import directly are local restaurants like Crepes and Waffles and owners of upscale restaurants. International food chains such as McDonalds, Fridays and Hard Rock Cafe also import directly.

Colombia has a population of 44 million and the number of restaurants located in the main cities is estimated at 62,937. The restaurant sector generates an estimated 402,796 direct jobs, while the hotel sector generates 54,000 direct jobs. In 2005, total Colombian food and agricultural imports (January-Dec) were \$1.9 billion of which the U.S. accounted for 35 percent or \$685 million of the total. Colombia continues to be our largest export market in Central and South America. Economic growth was estimated in 4.5 percent in 2005 and the projected economic growth in 2006 at 5%.

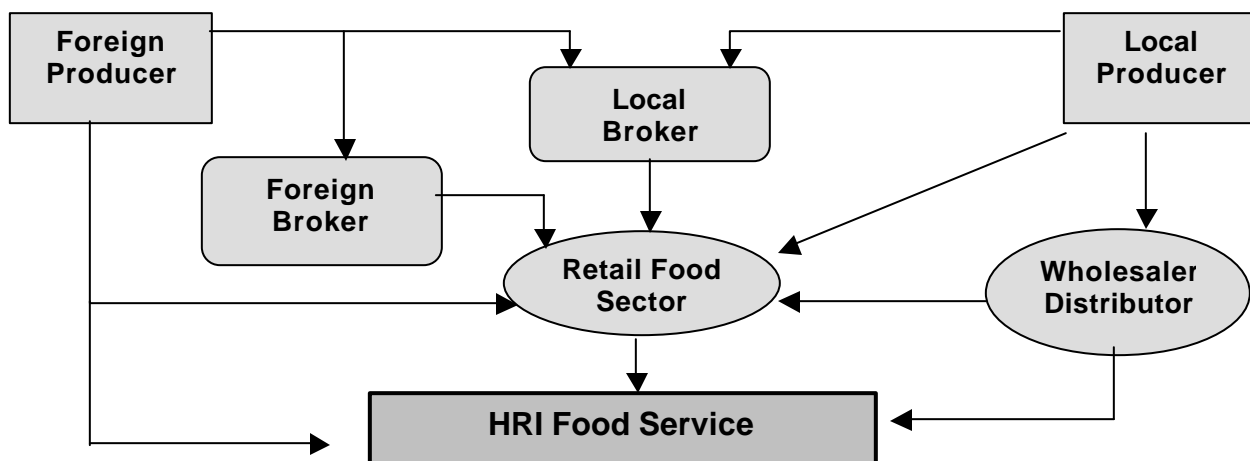
### Advantages and Challenges of Exporting to Colombia's HRI Sector

Advantages	Challenges
<ul style="list-style-type: none"> <li>○ The bilateral free trade agreement between the U.S. and Colombia will generate more interest in U.S. food products.</li> <li>○ U.S. products available in the market are considered by the Colombian consumers to be good quality.</li> <li>○ The Colombian HRI sector has great potential to grow driven by the tourism sector and improvements in purchasing power.</li> <li>○ The U.S. continues to be the number one trading partner of Colombia. Imports from the U.S. in 2005 account for 35% of food and agricultural imports.</li> <li>○ Multinational companies established in Colombia are taking advantage of their brand names to position new products for the HRI market.</li> <li>○ Large international fast food franchises are present in the market, but face strong domestic competition.</li> <li>○ The remarkably young population has stimulated the expansion of fast food chains and quick service restaurants.</li> <li>○ Increased female participation in the labor force is generating growing demand for value-added food products and beverages.</li> <li>○ Colombians are now more health conscious and selective shoppers.</li> <li>○ Upper and middle class Colombians are eating out more frequently, devoting 24% of their earnings to eating out.</li> <li>○ The 3.6 percent rising value of the Colombian peso in 2005, compared to the dollar, continued favoring imports of food products.</li> </ul>	<ul style="list-style-type: none"> <li>○ Product registration can be expensive (around \$1000 per product) and time consuming.</li> <li>○ Customs clearance is still cumbersome because of bureaucratic procedures and excessive red-tape.</li> <li>○ Consumption of processed foods is low by international standards and highly sensitive to price.</li> <li>○ U.S. products have to be of high quality, price competitive and accompanied by efficient service to face increasing competition from local processing companies.</li> <li>○ Innovation and new concepts for a low-cost portfolio is a must to gain market access.</li> <li>○ Supplies are important and U.S. companies offering products must guarantee consistent supplies all year round.</li> <li>○ Besides the basic duty of 20 percent for most processed food products, the Andean Community assesses a variable duty for a number of products such as pet food, poultry and cheese.</li> <li>○ Trade agreements with U.S. competitors make several U.S. products less competitive. Chile is the main competitor in wine and fresh fruits, with a zero duty for most products (some now have a 15% duty due to a trade dispute with Colombia).</li> <li>○ The cold storage transportation network is still a limiting factor for the future development of the food sector. Total cold storage capacity owned by the public and private sectors is estimated at 175,000 cubic feet.</li> </ul>

## II. Road Map for Market Entry Entry Strategy

- Competitiveness on the basis of high quality, low prices and efficient services.
- Innovative marketing strategies are a must in marketing new products. Social marketing continues to be used, with sales used to generate funding for social programs.
- After-sales service and customer support is a decisive purchasing factor in Colombia.
- U.S. suppliers should develop a way to meet the needs of the Colombian market. One way to learn about these needs would be with personal visits to get to know your buyer and how imported products are distributed and sold. The security situation in the country has been a problem in the past, but the situation is improving and visits to the main cities, where the main retailers and markets are located, is generally not a problem.
- U.S. suppliers should develop a way to meet Colombian market needs. One suggested way to dispatch small orders is to consolidate orders.
- Establish direct contact with hotels and restaurant chains for large orders.
- Develop business relations with top executives, i.e., marketing directors, purchasing managers, and expose them to U.S. business practices.
- Participate in local food trade shows and exhibitions using the support provided by the Office of the Agricultural Affairs/ Foreign Agricultural Service Office. Many Colombian companies also attend U.S. food shows such as the Food and Beverages of the Americas show in Miami, National Restaurant Association Trade Show in Chicago (NRA); Food Marketing Institute Trade Show in Chicago, FMI, Institute of Food and Technology, IFT and Produce Marketing Association, PMA.
- Develop Spanish marketing/communication materials that highlight products and services available.
- Work with local importers to register food products.

### Market Structure



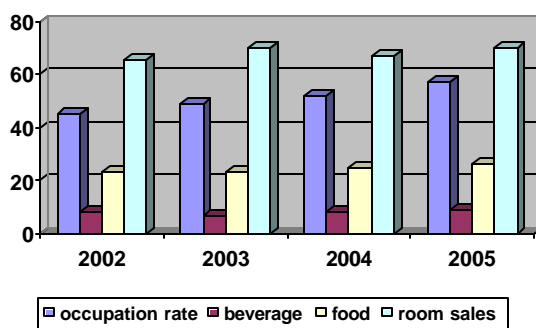
- A. The HRI establishments buy products from different distribution chains, reflecting each product's particular nature. For example, produce is bought from wholesalers, retailers and specialized fruit and vegetables stores. These stores are growing very fast offering consumers excellent quality fruits and vegetables. Imported meats, fish and seafood are obtained from dedicated importers who have the appropriate infrastructure to properly handle these products.
- B. Non-perishable and frozen foods are bought from hypermarkets specializing in food service.
- C. Wine and liquors are procured from importers/distributors and also from retailers that import directly a wide variety of wines from different countries.
- D. With the exception of fast food restaurant chains and a few upscale restaurants, there are few HRI establishments that import their products directly due to the small volumes needed. Consolidation of products for different restaurants would be an excellent option to overcome this constrain.

### Sub-Sector Profiles

#### Hotels and Restaurants in Colombia

Before 1997, hotels in Colombia were classified in one to five stars. With Resolution 300 dated July 26, 1996, the system was revised and the hotel price controls were removed, the 4% tourism tax was abolished and a 10% VAT (value-added tax) on lodging was established. As of 2005, the VAT on food and beverages is 16%. The Gremial Units, in charge of the normalization of the sectors, were created By Resolution 300. ACODRES, which is the Colombian Restaurant Association, determined that the restaurant classification in Colombia would be by forks. And COTELCO, the Colombian Hotel Association determined the classification of hotels would be by stars.

#### Hotel Sales Distribution



Source: Cotelco – Colombian Hotel Association

### Hotel Sales US\$ Million dollars

	2002	2003	2004	2005 E
Food	188.7	163.7	211.1	224
Beverages	59.3	47.8	70.4	75
Rooms	474.5	486.8	571.5	600
<b>Total</b>	<b>722.5</b>	<b>698.3</b>	<b>853</b>	<b>899</b>

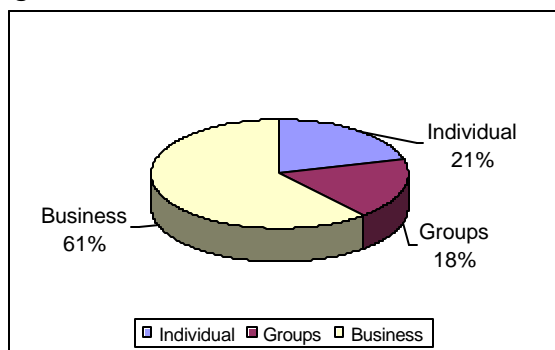
Source: Cotelco – Colombian Hotel Association

E= estimate

NRA: Colombian Restaurant Association

- According to the (National Statistics Department), hotel sales represent 1.8% of the GDP
- Hotel occupation in 2005 was 57 percent, considered high due to the improved security situation in the country.
- Hotels in Colombia generated 35% of revenue from food and beverage sales
- The average room charge at a luxury hotel is \$192. By international standards, Colombian luxury and first-class hotel room rates are relatively low.

### Foreign Tourism Distribution



- The strategy of the hotels is to strengthen their position and improve all aspects of services to the national and international community. The hotel sector is concentrating on the niche markets, such as business conventions, congresses and social functions.
- Hotels, airlines and travel agencies are working together to offer first-class integrated tourism packages.
- Decree 2755 dated 9/30/2003 established an exemption of 38% on profits taxes to companies that build or remodel hotels and tourist resources. With this exemption, the GOC seeks to promote building and maintenance of tourist hotels and resources.

**Main Hotel Chains in Colombia**

<b>Company Name</b>	<b>Units</b>	<b>Locations</b>
GHL Hoteles Ltda.	13	Bogota, Medellin, Cali, Santa Marta
Hoteles Estelar de Colombia	11	Bogota, Cali, Manizales, Cartagena, Medellin, Paipa, Armenia
Hoteles Dann	16	Bogota, Cali, Bucaramanga, Medellin, Ibague, Barranquilla, Cartagena, Quito
Hoteles Royal	6	Bogota, Cali
Hoteles Charleston	4	Bogota, Cartagena
Grupo Hotelero Mar y Sol	3	Cartagena, Cucuta, Valledupar
Inversiones German Morales	4	Santa Marta, Pasto, Tunja, Ibague, Monteria
Hoteles Irotama	1	Santa Marta
Klonis Hoteles	1	Cali

**International Hotel Chains in Colombia**

<b>Company Name</b>	<b>Country</b>	<b>Units</b>	<b>Locations</b>
Accor-Sofitel-Mercure	France	5	Bogota, Cartagena, Ibague, Cali
Embassy Suites	U.S.A.	1	Bogota
Forte Travelodge	U.S.A.	5	Bogota, Cali, Ipiales, San Agustin
Four Points by Sheraton	U.S. A.	2	Bogota, Medellin
Hilton International	U.S.A.	1	Cartagena
Inter-Continental	U.S.A.	3	Bogota, Medellin, Cali
Raddison Royal	U.S.A.	1	Bogota

**Restaurants**

- Total restaurant sales in 2005 are estimated at \$3.7 billion dollars
- Restaurant sales represent 1.8% of the GDP
- Restaurant sales are 1.9 times higher than hotel sales
- The restaurant industry generates 2.3% of the total employment in the main cities.
- Quick-service and fast food restaurants represent almost one third of the market.
- First class restaurants are the main consumers of imported products.

- o Fast food chains are expanding rapidly. They are very popular with Colombian consumers.
- o Fast food and quick-service restaurants have become the solution for families that have no time to prepare traditional meals. Those restaurants are also conveniently located around major work areas for lunchtime consumers.
- o Competition among fast food chains is intense
- o McDonald's, Presto, Del Corral, Burger King among others share the \$85 million hamburger market. McDonalds has a total of 29 restaurants located in Bogota, Barranquilla, Cartagena, Cali and Medellin.
- o Investment in advertising and promotional campaigns, including children's toys and games, has become the key to winning the hamburger war in Colombia.

#### Main Fast Food and Quick Service Chains in Bogota and Main Cities

Company Name	# Outlets	Company Name	# Outlets
Kokorico, Arca, Avesco	97	Oma Restaurant and Oma Express	49
MacDonald's* (U.S.)	29	Cali Mio	14
Frisby	72	Wimpy	18
El Corral	38	Charlie's Roastbeef Charlie Burgers	10
Catering (Avianca)	1	Pollo - Pizza - Carne	9
Presto	88	Pizza Hut	11
Crepes and Waffles	27	T.G.I. Friday's *(U.S.)	2
Jenno's Pizza	41	A Todo Taco	14
Brasa Roja	16	Lina's* (French)	2

*\*Franchising*

#### The Institutional Market

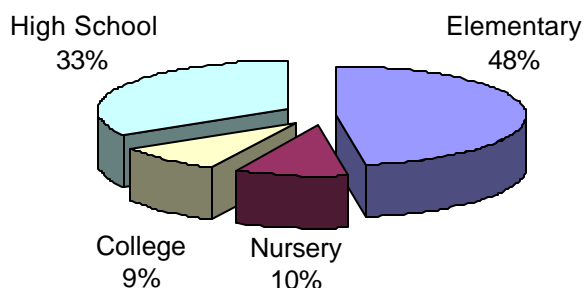
Procurement law regulates purchases and contracts by government industrial and commercial enterprises. Even when equal contracting conditions apply, goods and services of domestic origin are given preferences. The GOC urges all-official entities, and government decentralized industrial and commercial organizations to "buy Colombian"

The following areas are considered important within the institutional sector:



## Schools

### Students by Educational Level



- There are 11.8 million students in Colombia, of which 3.5 million are enrolled in private schools.
- Most private schools serve lunch; this is often obligatory at the elementary level and optional at the high school level. The price for an average school lunch is 2 to 3 dollars.
- There are food and beverage vending machines at some private schools and most universities.
- Sales of imported products in this sector are not currently significant. Nonetheless, there is significant potential for growth and an opportunity for U.S. products.
- Nutritional facts are key to this market segment.

### Colombian Government Programs

- Nearly 50% of the current student population is in elementary school.
- The GOC sponsors several programs aimed at improving nutritional standards for children attending public schools. Children belonging to low-income families often have substandard nutrition.
- GOC food assistance programs, which provide a nutritional balanced lunch supplement, reach around 4 million children up to 14 years of age. Nursing mothers, elderly people and teenagers from the street are also included in the programs.
- The Colombian Family Welfare Institute (ICBF), and all regional educational offices implement the GOC programs. The annual ICBF budget is about \$51 million.
- Bogota's educational office budgeted \$84 million for food programs for the period 2002-2004. The program called "Feeding for the future" intends to cover 80% of nursing mothers, elderly people and teenagers from the street and 100% of children attending public schools.
- Breakfast, lunches and snacks include products enriched with vitamins and calcium to make them healthier.

### Health Care Institutions

- In Colombia, there are more than 68 hospitals with a capacity of more than 180 beds, for a total of 18,000 beds. The number of hospitals and health units are estimated at around 3,697. The average food budget for a 200-bed hospital is around \$140,000 per year.
- There are 12 million contributors to health institutions of which one-fifth belong to the Social Security System.
- U.S. products that are consistent with dietary and health recommendations and are competitively priced may find a market opportunity here.

### Armed Forces Institutions

- Armed forces (police, army, marine and air force) budgets for food are significant, averaging \$80 million each annually.
- The daily per capita food budget per soldier is \$1.70.
- Armed forces directors are analyzing ways to improve the nutritional value of food rations and at the same time make the food more appetizing.
- Opportunities to bid on food purchases are open through domestic suppliers

### Social and Country Clubs

- There were more than 100 urban and country clubs in Colombia. But, in the midst of economic slowdown, several mergers and acquisitions took place among clubs. Some clubs belong now to corporate businesses.
- The average club budget for food is about \$3 million annually.
- In 2004, clubs started to slowly recover sales as result of memberships. Social events for non-members are still making up for the reduction in sales to club members.
- Clubs are the second best market for upscale imported products.

### Typical Imported Products Used by Clubs

Salmon	Sausages	Bagels	Liquors
Whitefish	Hams	Saffron	Nuts
Caviar	Turkey	Spices	Pistachio
Anchovies	Olive oil	Salad Dressings	Cheeses
Other Seafood	Olives	Vinegar	Candies

## III. Competition

The Colombian government protects local producers. The use of tariffs on imported goods and discretionary issuance of import licenses and permits serves to promote the use of local production. Nevertheless, there is good market for imported products due to high quality and better results in preparation of menus.

### Competition Situation Facing U.S. Suppliers

Product Category	Rank	Country	Share of Import Market U.S. Millions
<b>Meat</b> Net Imports: US\$ 18 U.S. Millions	1	USA	7.4
	2	Chile	4.8
	3	Canada	2.8
	4	Argentina	0.7
<b>Meat Offals</b> Net Imports: US\$ 9.5 U.S. Millions	1	USA	4.0
	2	Chile	2.2
	3	Canada	0.8
	4	Argentina	0.3
<b>Dairy Products</b> Net Imports: US\$ 11.8 U.S. Millions	1	USA	3.9
	2	Rep. Czech.	2.8
	3	Venezuela	0.7
	4	Netherlands	0.6
<b>Milling, Malt, Starches</b> Net Imports: US\$ 6.6 U.S. Millions	1	Chile	1.7
	2	Belgium	1.2
	3	Thailand	0.6
	4	USA	0.5
<b>Edible Fruits and Nuts</b> Net Imports: US\$ 82 U.S. Millions	1	Chile	49.0
	2	USA	14.0
	3	Ecuador	6.5
	4	Venezuela	4.0
<b>Prepared Meat, Fish, etc.</b> Net Imports: US\$ 85.7 U.S. Millions	1	Ecuador	52.7
	2	USA	10.7
	3	Peru	5.0
	4	Chile	3.5
<b>Baking Related</b> Net Imports: US\$ 57.6 U.S. Millions	1	Mexico	7.5
	2	Venezuela	7.4
	3	Peru	6.9
	4	USA	2.4
<b>Miscellaneous Foods</b> Net Imports: US\$ 99.5 U.S. Million	1	Brazil	41.2
	2	USA	21.2
	3	Mexico	11.2
	4	Chile	3.6
<b>Beverages</b> Net Imports: US\$ 82 U.S. Million	1	England	18.4
	2	Chile	10.7
	3	Ecuador	8.5
	4	Mexico	6.8
	5	USA	1.6

- Colombia grants preferential treatment to products from countries in the Andean Community. Also, bilateral agreements provide preferential duties to countries, such as Chile (Bilateral Free Trade Agreement) and Mexico (G-3, Mexico, Venezuela and Colombia). Colombia has recently implemented a bilateral trade agreement with Mercosur.
- U.S. products are relatively expensive compared to domestic products.
- Competition has intensified. Food products from around the world are found on the shelves of Colombian stores, and Colombian companies and foreign affiliates are launching a variety of new-frozen and ready to eat products.
- Some fast food chains bring their inputs directly from the U.S. to meet production standards defined under franchising agreements.

#### ○ **IV. Best Products Prospects**

- Colombia is a growing market for value-added food products
- Surveyed retailers and producers feel there is significant potential for new products in almost all food product categories.
- Healthy and ethnic food categories are especially new and fast growing
- Wines and gourmet products are penetrating the market with excellent results.
- Frozen products represent 33% of total sales, followed by chilled products 32% and dry products 22%
- Organics is the new trend and retailers are searching for the best suppliers of such products.

The following products category represents the major export opportunities and some emerging opportunities of U.S. food products to Colombia. These products will be even more competitive once the free trade agreement between the U.S. and Colombia is implemented.

<b>Product</b>	<b>Code</b>	<b>Import Tariff</b>
<i>Beverages:</i>		
Mixes	0813	20%
Wines	2204	20%
<i>Fish and Seafood:</i>		
Fish, shrimp, crab, lobster.	0302, 0303 0304	20%
<i>Meat, Pork and Poultry:</i>		
Pork (tariff varies)	0203	20%
Poultry (frozen Processed)	1602	20%
<i>Condiments and Sauces</i>		
	2103	20%
<i>Pasta and Bakery:</i>		
Baking mixes, pastas	1901	20%
Desserts	1905	20%
<i>Frozen Products:</i>		
vegetables	0710	15%

#### IV. Related Reports

Report No.	Report Name	Date
CO-4013	Dairy and Products	10-20-04
CO-4007	Wine and Liquors	6-02-04
CO-4017	Bakery premix study	1-05-05
CO-5015	Food and Agricultural Import Regulations and Standards (Fairs)	8-12-05
CO-5001	Rice and white corn	1-4-06
CO-5003	Oilseeds and Products	2-2-05
CO-5005	Grain and feed	3-7-05
CO-5007	Sugar	4-11-05
CO-5008	Cotton	5-2-05
CO-5010	Coffee	5-19-05
CO-5021	Retail Food Market 2004	11-22-05

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